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South Africa, Republic of

Canned Deciduous Fruit

Annual

2007

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Report Highlights:

South Africa's fresh deciduous fruit deliveries (apricots, pears, and peaches) for canning increased by 4.5 percentage in 2006/7 compared to last year because weather conditions that returned to normal, improving the total deciduous fruit production.

Canned deciduous fruit exports are expected to increase by about 10 percentage also because of the general increase in deciduous fruit production as compared to last year.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
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Pretoria [SF1]
[SF]

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Executive Summary

South Africa's fresh deciduous fruit deliveries (apricots, pears, and peaches) for canning increased by 4.5 percentage in 2006/7 compared to last year because weather conditions returned to normal, improving the total deciduous fruit production.

The 2006/7 updated figures indicate a decrease of 36 percentage in fresh apricot deliveries for canning because of improved quality production of stonefruit resulting from a return to normal weather conditions. Pears sent for canning increased slightly (2.8 percentage) because the improved quality that caused more fruit to be sold in the fresh markets. Fresh peach deliveries for canning also increased by 28 percentage because of increase in total production compared to last year.

Canned deciduous fruit exports are expected to increase by 10 percentage to reach 174,000 MT in 2007, while imports are expected at around 220 MT. The season is also expected to remain with a reduced stock (2 percentage).

This report is primarily an update on fruit sent for deliveries, imports, and exports. It will be revised as soon as the official data for canned packs (production) is available.

Production

FRUIT TYPE	2004/5	2005/6	ESTIMATE 2006/7
ROYAL TYPE APRICOTS			
Pulp, Jam and Juice	200	210*	220*
BULIDA TYPE APRICOTS			
Canned	28207	40316	25384
Juice and Pulp	4987	12028	7954
TOTAL CANNED APRICOTS	33394	52554	33558
CLINGSTONE PEACHES			
Canned	112811	85492	100921
Juice and pulp	21253	13560	25409
TOTAL CANNED PEACHES	134064	99052	126330
BON CHRETIEN PEARS			
Canned	46749	49709	54996
Juice and Pulp	11312	10121	7558
Total Bon Chretien Pears	58061	59830	62554
OTHER VARIETY PEARS			

Canned, Juice and Pulp	37269	25373	25000*
TOTAL CANNED PEARS	95330	85203	87554

Source: Canning Fruit Producers' Association

* = FAS estimates

Total deciduous fruit Production Estimates in September, 2006/7			
	2004/5	2005/6	2006/7
Royal Apricots	13750	15500	15000*
Bulida Apricots	39000	47500	35000
Clingstone Peaches	166000	140000	156000
Bon Chretien Pears	85000	85000	80000
Other Pears	37269	25373	31300*
Total deciduous Fruit	341019	313373	317300

Source: Canning Fruit Producers' Association

* = FAS estimates

Production Subcategory**PSD Table**

Country	South Africa, Republic of			(MT)(MT, Net Weight)						
Commodity	Canned Apricots			2006	Estimate	2007	Forecast	UOM		
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
Market Year Begin		01/2006	01/2006		01/2007	01/2007		01/2008	01/2008	MM/YYYY
Deliv. To Processors	0	40316	54554	40000	40000	33554	0	0	45000	(MT)
Beginning Stocks	0	20336	20336	20336	29158	20855	20356	29178	17865	(MT, Net Weight)
Production	0	44990	50000	40000	40000	37000	0	0	48000	(MT, Net Weight)
Imports	0	20	5	20	20	10	0	0	10	(MT, Net Weight)
Total Supply	0	65346	70341	60356	69178	57865	20356	29178	65875	(MT, Net Weight)
Exports	0	21188	34486	25000	25000	25000	0	0	30000	(MT, Net Weight)
Domestic Consumption	0	15000	15000	15000	15000	15000	0	0	15000	(MT, Net Weight)
Ending Stocks	0	29158	20855	20356	29178	17865	0	0	20875	(MT, Net Weight)
Total Distribution	0	65346	70341	60356	69178	57865	0	0	65875	(MT, Net Weight)

PSD Table

Country	South Africa, Republic of					(MT)(MT, Net Weight)					
Commodity	Pears, Canned										
	2005	Revised		2006	Estimate		2007	Forecast		UOM	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New		
Market Year Begin		01/2006	01/2006		01/2007	01/2007		01/2008	01/2008	MM/YYYY	
Deliv. To Processors	49709	49709	85203	50000	50000	87554	0	0	89000	(MT)	
Beginning Stocks	9001	9001	2989	11991	11991	15420	11511	11511	17430	(MT, Net Weight)	
Production	32470	32470	55700	32000	32000	57000	0	0	57000	(MT, Net Weight)	
Imports	20	20	12	20	20	10	0	0	0	(MT, Net Weight)	
Total Supply	41491	41491	58701	44011	44011	72430	11511	11511	74430	(MT, Net Weight)	
Exports	26000	26000	36281	28000	28000	45000	0	0	46000	(MT, Net Weight)	
Domestic Consumption	3500	3500	7000	4500	4500	10000	0	0	10000	(MT, Net Weight)	
Ending Stocks	11991	11991	15420	11511	11511	17430	0	0	18430	(MT, Net Weight)	
Total Distribution	41491	41491	58701	44011	44011	72430	0	0	74430	(MT, Net Weight)	

PSD Table

Country	South Africa, Republic of					(MT)(MT, Net Weight)					
Commodity	Peaches, Canned										
	2005	Revised		2006	Estimate		2007	Forecast		UOM	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New		
Market Year Begin		01/2006	01/2006		01/2007	01/2007		01/2008	01/2008	MM/YYYY	
Deliv. To Processors	85492	85492	85492	100000	100000	100921	0	0	93000	(MT)	
Beginning Stocks	19532	19532	5363	5674	5674	9854	10924	10924	10954	(MT, Net Weight)	
Production	69892	69892	69892	90000	90000	83000	0	0	76000	(MT, Net Weight)	
Imports	250	250	108	250	250	100	0	0	100	(MT, Net Weight)	
Total Supply	89674	89674	75363	95924	95924	92954	10924	10924	87054	(MT, Net Weight)	
Exports	73000	73000	55509	70000	70000	70000	0	0	65000	(MT, Net Weight)	
Domestic	11000	11000	10000	15000	15000	12000	0	0	12000	(MT, Net Weight)	

Consumption										Weight)
Ending										(MT, Net
Stocks	5674	5674	9854	10924	10924	10954	0	0	10054	Weight)
Total										(MT, Net
Distribution	89674	89674	75363	95924	95924	92954	0	0	87054	Weight)

PSD Table

Country	South Africa, Republic of						(MT)(MT, Net Weight)			
Commodity	Canned Mixtures									
	2005	Revised		2006	Estimate		2007	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
Market Year Begin		01/2006	01/2006		01/2007	01/2007		01/2008	01/2008	MM/YYYY
Deliv. To										
Processors	0	271826	236809	290000	290000	247442	0	0	250000	(MT)
Beginning										(MT, Net
Stocks	0	2947	2947	2947	3640	3437	4047	4740	3537	Weight)
Production	0	41718	36470	40000	40000	38000	0	0	39000	(MT, Net
Imports	0	140	101	100	100	100	0	0	100	Weight)
Total Supply	0	44805	39518	43047	43740	41537	4047	4740	42637	(MT, Net
Exports	0	36965	32081	35000	35000	34000	0	0	35000	Weight)
Domestic	0	4200	4000	4000	4000	4000	0	0	4000	(MT, Net
Consumption	0	3640	3437	4047	4740	3537	0	0	3637	Weight)
Ending										(MT, Net
Stocks	0	44805	39518	43047	43740	41537	0	0	42637	Weight)
Total										(MT, Net
Distribution	0	44805	39518	43047	43740	41537	0	0	42637	Weight)

Consumption

The local markets receive about 20 percentage of canned deciduous fruit production annually, which are sold to large retail chains (Pick n Pay, Shoprite Checkers, and Spar), or through wholesalers (Metro and Massmart) or food service market (mainly commercial caterers like Caterplus) (see under the heading: Marketing).

Trade

South Africa's 2007 exports are expected to total 174,000 MT, which is a 10 percentage increase from last year.

South Africa's export of canned apricots increased by 67.5 percentage to reach 34,486 MT in 2006 compared to the previous year. Of the total exports, the Netherlands received the largest volume of about 435 percentage more than in 2005. Germany received about 35 percentage more products than in 2005. Exports to the U.S. decreased by 32 percentage in 2006. (See a table under trade subcategory).

South Africa's exports of canned peaches decreased 21.9 percentage from 2005 to 55MT in 2006. Japan and Hong Kong remained the largest supplied markets, while Russia lost its 3rd

position to the U.K as the country's major canned peaches destination by receiving 64 percentage lower products than in 2005. (See a table under trade subcategory).

Canned pears exports increased by 58 percentage to total 36,000 MT in 2006. The largest supplied markets were the Netherlands (25.9 percentage), Germany (13.5 percentage), and the U.K. (12.5 percentage). Supply to the Netherlands increased from 2,000 MT to reach more than 9,000MT in the same year.

Export of canned fruit mixtures decreased by 11.8 percentage from 2005 to 32,081 MT in 2006. Japan and Canada continued to receive the largest volumes, while supply to Australia increased massively and overtook the U.K. to gain position as the 3rd largest destination for South African products.

Trade Subcategory

Export Trade Matrix

Country South Africa, Republic
of
Commodity Canned Apricots

Time Period

Jan-Dec

Units:

MT

Exports for:

2005

2006

U.S.

324

U.S.

2006

Others

Others

Germany	6277	Netherlands	11266
U.K.	2585	Germany	8474
Netherlands	2104	U.K.	2910
Australia	2092	Australia	1812
Japan	1570	Belgium	1765
New Zealand	1126	Japan	1665
France	802	France	979
Switzerland	787	Switzerland	862
Belgium	559	New Zealand	860
Canada	445	Russia	705

Total for Others 18347

31298

Others not Listed 1916

1182

Grand Total 20587

34486

Source: WTA

Export Trade Matrix

Country South Africa, Republic of
Commodity Peaches, Canned

Time Period	Jan-Dec	Units:	MT
Exports for:	2005		2006
U.S.	1128	U.S.	447
Others		Others	
Japan	12697	Japan	12198
Hong Kong	6797	Hong Kong	7438
Russia	5630	U.K.	4298
Netherlands	5606	Australia	4274
U.K.	4719	Canada	3570
Canada	4139	Switzerland	2664
Thailand	4010	Netherlands	2644
Germany	3472	Germany	2487
Australia	3321	Russia	2017
Korea	2783	Belgium	2015
Total for Others	53174		43605
Others not Listed	16839		11457
Grand Total	71141		55509

Source: WTA

Export Trade Matrix

Country South Africa, Republic
of
Commodity Pears, Canned

Time Period	Jan-Dec	Units:	MT
Exports for:	2005		2006
U.S.	257	U.S.	710
Others		Others	
U.K.	4699	Netherlands	9423
Japan	2907	Russia	4908
Netherlands	2017	U.K.	4535
Germany	1832	Japan	3208
Switzerland	1820	Germany	2810
Thailand	1735	Belgium	2107
Canada	1464	Switzerland	1648
Belgium	1275	Canada	1438
France	1069	Australia	1042
Australia	982	France	875
Total for Others	19800		31994
Others not Listed	2923		3577
Grand Total	22980		36281
Source: WTA			

Export Trade Matrix

Country South Africa, Republic of
Commodity Canned Mixtures

Time Period	Jan-Dec	Units:	MT
Exports for:	2005		2006
U.S.	408	U.S.	2580
Others		Others	
Japan	5355	Japan	4743
Canada	4732	Canada	3221
U.K.	3883	Australia	2915
Switzerland	2686	Singapore	2604
Singapore	2383	U.K.	2483
Australia	2217	Switzerland	2441
Germany	1988	Germany	1873
Belgium	1803	Belgium	1246
Austria	1566	Austria	1072
Netherlands	979	France	1072
Total for Others	27592		23670
Others not Listed	7860		5831
Grand Total	35860		32081

Source: WTA

IMPORTS

Canned peaches imports in South Africa decreased massively by 48 percentage to 108 MT in 2006 because of improved total local peach production. China took over Greece's 2nd position market share in the local markets in 2006 by increasing its exports to South Africa significantly from 2MT in 2005 to 48 MT. It is almost head-on with Spain (50MT).

Canned pears imports in South Africa increased by 71 percentage to reach 17MT in 2006, with Spain as the largest supplier at 12 MT, followed by the U.K. at 5MT. Imports from Spain improved from nil in 2005 because of lower total production in that region, although the 2006 volumes were still lower than the 21 MT in 2004.

Imported canned apricots to South Africa decreased by 58 percentage to reach 5MT in 2006, with products mainly from New Zealand. Imports to South Africa are of a lower volume because South Africa is the 2nd largest producer of apricots in the Southern Hemisphere, and enough fruit are left after export to be distributed for local consumption.

Imports of canned fruit mixtures in South Africa increased by 29 percentage to reach 101 MT in 2006. New Zealand took over market share from China (108MT in 2005) although at a lower volume. Imports from the U.S. improved to total 4 MT, and was at 4th position in 2006, from no imports in the past two years.

Policy

(NO CHANGE FROM THE PREVIOUS REPORT: SF 6041)

The Department of Trade and Industry approved the establishment of an export council, the South African Fruit and Vegetable Canner's Export Council (SAFVCEC), which is a section 21 Company that will be managed by the Cannery Association (SAFVCA). However, membership will be extended to all export-oriented stakeholders in the canning industry.

Requirements for imported canned products :

Imported canned food products comply with the local legislation for canned products. Below are some of the specific requirements of the rule:

Restrictions on the sale of canned fruit

Canned fruit should comply with the applicable grades for each canned fruit product. All grades of canned fruit should be prepared from fresh, clean and washed fruit, and be free from any foreign substances, excluding extraneous vegetable matter and permitted food additives. Grades should be either - extra choice, choice, standard, substandard, or manufacturer, and should comply with the specific quality standards *per* product.

Canned fruit packs should be presented as either regular - consisting of fruit packed in a packing medium; heavy - consisting of crushed style fruit with/without sweetening ingredients and consisting of at least 73 percentage drained mass; or solid - consisting of all fruit with very little or no free flowing liquid. Any other presentation of the canned product shall be permitted provided that it is sufficiently distinctive from other forms; meets all other requirements of the regulations and closely resembles that particular style, or is adequately described on the label to avoid confusing/misleading the consumer.

The packing media should be either water – as a sole medium; water and juice(s) – water and juice from the same fruit or water and any other single/more juices combined in any proportion to form a packing medium; or fruit juice(s) – juice from the same fruit or compatible fruit as the sole medium/ two to more compatible fruit juices combined to form the packing medium. If more juices are mixed, the juices should be pulpy, turbid or clear. The packing media should be declared as one of the following - "packed in water"; "in water"; packed in water and 'x' juice(s); "in water and 'x' juice(s); packed in 'x' juice(s); or "in 'x' juice(s) where 'x' indicates the name (s) of the specific juice (s). The packing medium may contain permitted nutritive sweeteners or non-nutritive sweeteners and flavorants. The packing media having permitted nutritive sweeteners should further be classified as very light syrup (9 degree Brix but less than 14 degree Brix); light syrup (14 degree Brix but less than 18 degree Brix); Syrup (16 degree Brix but less than 20 degree Brix); heavy syrup (not less than 18 degree Brix). Any product addition should comply with the limits, unless 33.3 percentage of containers in an inspection sample may deviate by 1 degree Brix. The packing medium with permitted non-nutritive sweeteners should be declared as "packed in water sweetened with non-nutritive sweeteners", "in water sweetened with non-nutritive sweeteners", "packed in water with 'x' ", or "in water sweetened with 'x', where 'x' indicates the name (s) of the specific non-nutritive sweetener(s).

Containers for canned fruit should be intact, clean, suitable and strong enough for the packaging and normal handling of the canned, and re-usable containers sterilized. Containers should also be rust-free with no serious dents or disorders that may be detrimental to the product quality; not emits any undesirable taste/odour to the product; and

Should be closed properly and in a manner permitted by its nature.

Canned fruit of different kinds, grades, or styles should not be packed in the same container or outer container, unless otherwise specified within the regulations. The Manufacturer's Grade should be packed in A10 or larger containers. The composition of the unspecified canned fruit mixes should be listed in descending order and sent together with the proposed quality standards, to the Executive Officer for approval.

Canned fruit containers should be clearly and legibly marked or labeled with – A code mark indicating the name of the canning industry, the product, and the date of manufacturer - and approved by the Executive Officer; the name of the trade mark of the manufacturer/packer; the physical address of the manufacturer/packer; a panel indicating true description of the contents and ingredients; A product name declaring the packing medium or the packing medium in close proximity to the product name; the grade, unless "Caterers Grade" is used instead of "Manufacturers Grade"; the net mass of the contents as required by the Trade Metrology Act, 1973; "Product of" followed by the full name and country of origin. An outer container should indicate the number of containers packed. Additional information can be accessed at: www.nda.agric.za